



Source Selection Documentation

June 00



Documentation is Critical

- **Poor documentation continues to come out on the list of “common protest pitfalls”**
 - **Documentation of evaluation and source selection continues to be critical**
 - **GAO gives little weight to post-protest evidence that was not “memorialized” in pre-protest analyses or judgments**



What Needs to be Documented?

- **Evaluations**
 - **Proposal Evaluation Report (PER) or Proposal Analysis Report (PAR)**
- **Competitive Range Decision**
- **Final Decision**
 - **Source Selection Decision Document (SSDD)**



Streamlined Documentation

- **Basic - All documentation is contained in the PER**
- **Median and Agency - Charts serve as documentation for Competitive Range**
- **Median - Briefing charts may substitute for PAR**



Evaluation Documentation

- **Documented Using Worksheets**
- **Source Selection Procedures Guide**
 - **Attachment 1 Rating Team Worksheet**
 - **Attachment 2 Evaluation Notice (EN)**
 - **Attachment 3 Analysis Worksheet**
 - **Attachment 4 Subfactor Summary**
- **AFFARS 5315.3 and Source Selection Procedures Guide Part 4 provide additional information**



Evaluation Documentatoin

- **Worksheet process**
 - **Mission Capability - 1 worksheet per subfactor**
 - **Proposal Risk - 1 worksheet per subfactor**
 - **Past Performance - 1 worksheet at factor level rather than subfactor**
- **Evaluations summarized in PAR -- key is consistency**



Competitive Range Documentation

- **Documented with Briefing Charts**
- **Include sufficient detail to support recommendation**
 - **Initial evaluation**
 - **Purpose - selection of offerors with reasonable chance of award**



Briefing Slides continued

For additional assistance in developing briefing slides see the separate briefing entitled "Template for Decision Briefings"



Format for PER

- **Proposal Evaluation Report (PER)**
 - **Basic source selections only**
 - **Section I - Modified SSP**
 - **Section II - Evaluation by offeror**
 - **Section III - Comparative analysis of offerors**
 - **Section IV - SSDD**



Proposal Analysis Report (PAR)

- **4 Parts**
 - **Part 1 - Introduction**
 - **Part 2 - Description of Proposals - Summaries**
 - **Part 3 - Evaluation Results**
 - **Part 4 - Comparative Analysis of Offers**



- **Introduction**
 - **Summary of Requirement**
 - **Evaluation Factors from RFP**
 - **Identification of Offerors by name who responded and those included in the competitive range**
 - **See AF Source Selection Procedures Guide 4.10.1**



PAR - Part 2

- **Description of Proposals - Summaries**
 - **Keep it brief -- This is an executive summary**
 - **Only address unique attributes of each proposal**
 - **Do not include judgements (evaluations) or comparisons with other offerors**
 - **Address any proposed teaming arrangements**
 - **Only include proposals that were in competitive range AF Source Selection Procedures Guide, para. 4.10.2**



- **Evaluation Results**
 - **Factor summaries**
 - **Mission Capability**
 - **Proposal Risk**
 - **Past Performance**
 - **Price/Cost**
 - **Can be presented by offeror (all subfactors addressed sequentially) or by subfactor (for each subfactor discuss each offeror)**
 - **Only address final ratings**
- **AF Source Selection Procedures Guide 4.10.3**



PAR - Part 3 Mission Capability Subfactor

- **Address every subfactor for every offeror**
- **Include color rating assigned**
- **Ensure offerors with similar strengths or deficiencies are evaluated consistently**
- **Do not evaluate anything that was not included in Section M of the RFP**



PAR - Part 3 Blue Ratings

- **Ensure the proposal really exceeds the requirements**
- **Make sure it is beneficial to the government and not just to the contractor**
- **Explain why it exceeds the requirement and why it is a benefit (why we are willing to pay more)**



PAR - Part 3 Proposal Risk

- **Fully explain all risks associated with offeror's approach**
- **Address what contractor has proposed to mitigate the risk**
- **Discuss whether the proposed risk mitigation is acceptable and how it impacts the risk rating assigned**
- **Ensure offerors with similar weaknesses and risks are evaluated consistently**



PAR - Part 3 Past Performance Factor

- **Address quality, recency and relevance of past performance for prime and subcontractors**
 - **Discuss how the performance being evaluated relates to the work being contracted for**
 - **More recent and relevant projects should carry more weight in determining the rating than less recent, less relevant projects**
 - **Include discussion about type and percentage of work effort that will be performed by subcontractors and how that impacts the overall evaluation of past performance**



Cost

- **Detail is less than a sole source PNM but needs to be sufficient for understanding of major cost elements**
- **Significant cost differences between proposals and the Government Estimate needs to be explained - technical drivers, overhead, rates etc.**
- **If Most Probable Cost was conducted that needs to be explained**
- **Summary of DCAA support and disposition of any analysis provided**



PAR - Part 4 Comparative Analysis

- **Comparative Analysis**
 - **Focus on differences between offerors**
 - **Address potential trade-offs**
 - **Complete integrated assessment**

**AF Source Selection Procedures
Guide 4.10.4**



Part 4 - Comparative Analysis

- **Cover all offerors in competitive range**
 - **Strengths**
 - **Inadequacies**
 - **Risks**
 - **Weaknesses**
 - **Deficiencies**
 - **Ratings for each factor and subfactor**
- **Address why any offerors were eliminated from competitive range**
- **Do not include anything here that wasn't already covered in detail in the evaluation section**
- **Focus only on key discriminators**



PAR continued

For additional assistance in developing a good PAR see the separate tool entitled "PAR Help"



Source Selection Decision Briefing Charts

- **Briefing Charts for SSA Decision Meeting**
 - **Not required for Basic**
 - **Intended to be “PAR”-type documentation for Median**
 - **Show only final ratings**
 - **Do not show ratings from initial competitive range briefing**
 - **Remember - the offeror will be provided the opportunity to see the charts pertaining to the evaluation of their proposal during the debriefing**
 - **Charts need to be clear**
 - **Charts need to tie to decision made**
 - **Charts need to be consistent with PAR**



Briefing Slides continued

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Source Selection Decision Document

- **Should be able to stand on it's own**
- **Consistent with evaluation factors in RFP**
 - **Each conclusion linked to evaluation factor**
- **Address any debate between the 2 or 3 highest ranking offerors**
- **SSDD should match what was briefed to the SSA**
- **Focus on key discriminators**



Exercises



Exercise 1

- **Sample SSDD segment: Software Development**
- **What problems do you see?**
- **The discussion only focuses on one offeror**
- **The lead-in states it is “clearly superior” but nothing in the narrative addressed this and the rating of green seems to contradict the statement as well.**
- **A weakness is mentioned but not discussed. How did the SSA view the weakness and how did it affect the thought process?**
- **Risk needs to be either low or moderate not a range.**



Competitive Range Chart

- **If you were the SSA reviewing this chart and the narrative what comments would you make?**
- **Chart and narrative don't reflect same color ratings**
- **Nothing about task order start-up**
- **Performance risk - very good equates to significant confidence not significant which is satisfactory**
- **Nothing in narrative about the subcontracting advertising, strong mentoring or tool**